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INDITION COMMERCE

Special Orders Setup Guide

Enable the module, configure policy, and verify a complete order

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Prepare Special Orders for your selling and fulfillment workflow. Choose staff responsibilities, eligible merchandise, deposit rules and the purchasing routine your team will use.

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Prepare staff access and the order workflow

Have your administrator assign access for the people who will create orders, manage purchasing, assign inventory, take balance payments and complete handover. Then review the settings and practice the workflow your team will use.

Enable the module and choose creation roles

Open Special Orders Settings. Set Special Orders Enabled to YES, leave Accept new special orders at YES, and review Roles allowed to create special orders. Review the default selected staff roles and remove any that should not create future-delivery items. When POS is installed and enabled, a separate Enable special orders from POS switch and register-role selection appear.

Administrators retain full access; the selectable creation roles organize staff access to new orders. If the configurable list is empty, ordinary staff cannot create Special Orders. Click the single Save Settings button; it covers every section.

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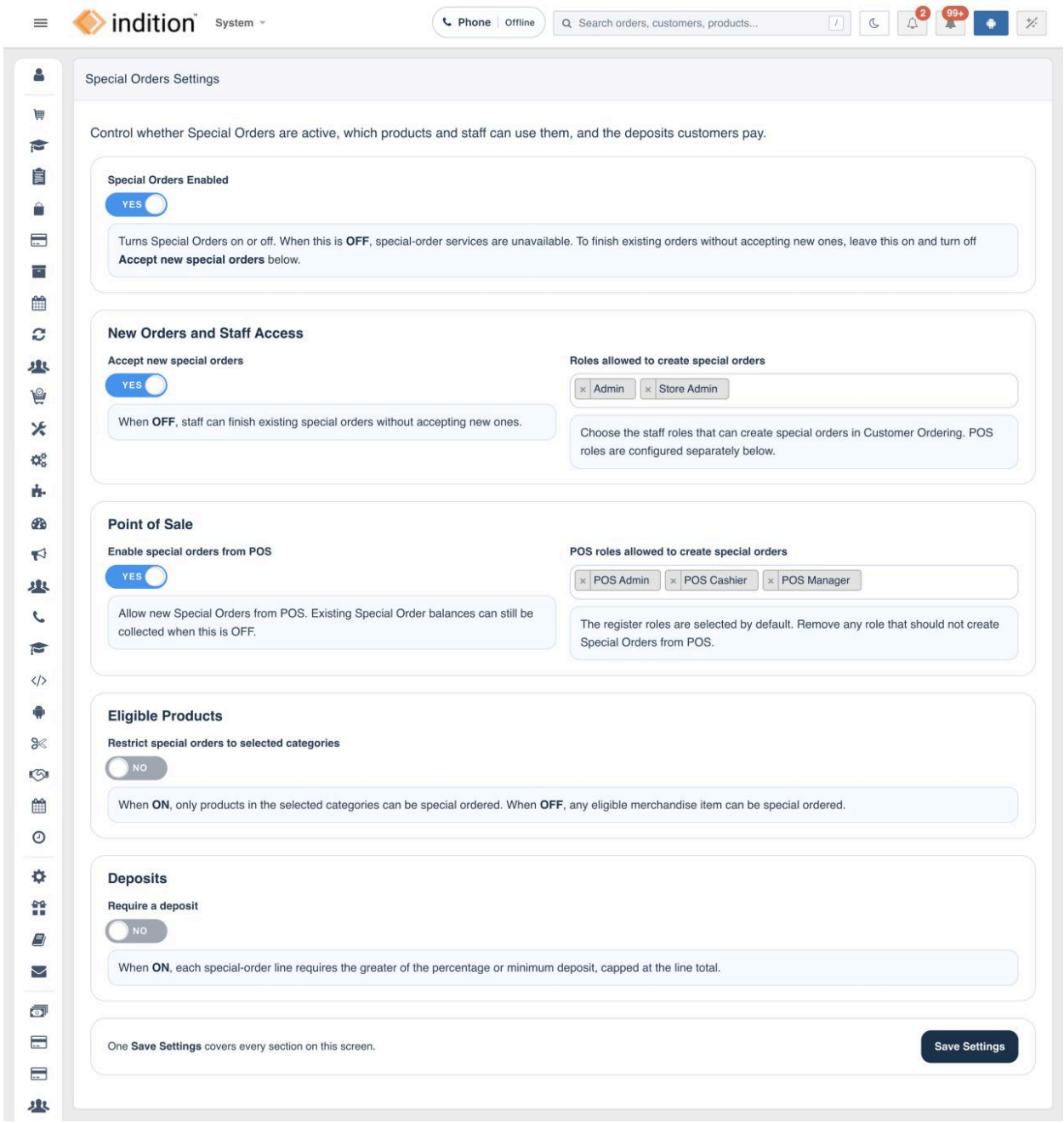

Enable Special Orders, choose whether to accept new orders and assign creation access for customer ordering and the register.

Choose eligible merchandise

Leave Restrict special orders to selected categories at NO to allow eligible merchandise across categories. Set it to YES to display the searchable checkbox selector. Search for categories, use Select All or Clear All when appropriate, and review every selected category in the list beneath the control.

Selected parent categories include child categories. At least one eligible category is required when restrictions and acceptance of new orders are both enabled. Gift cards and payment-only lines are not merchandise eligible for this workflow.

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Set the minimum deposit

Set Require a deposit to YES to expose Deposit percentage and Minimum deposit per item line. The minimum is calculated separately for each future-delivery line after discounts, before tax and shipping.

The rule is `minimum deposit = min(line merchandise total, max(percentage amount, floor))`. A cashier can choose a higher deposit. A deposit above the line total, for example a full-price deposit entered before a discount, is capped at the total, which means paying the line in full. With the deposit requirement OFF, zero is allowed. When the cashier chooses Pay, the register checks saved deposits again and raises any that a later quantity or discount change left below the minimum.

Line total	Percentage	Floor	Required deposit
$300.00	25%	$50.00	$75.00
$100.00	25%	$50.00	$50.00
$40.00	25%	$50.00	$40.00

The deposit is merchandise money: a Special Order item's tax is added to its balance due later, so an item taken with no deposit has nothing due today. An item paid in full today pays its tax today. Regular goods, their tax, and other current charges are always due today. In Customer Ordering, an authorized card payment counts toward the deposits just as a captured one does. The register collects exactly the amount due today and refuses tenders that come to more. Customer Ordering checkout refuses gift cards on a cart that contains Special Order items.

Prepare Inventory and purchasing

Enable Inventory and confirm the intended warehouses and locations are active. Check available quantities and serialization settings for the SKUs to be used. A serialized item will need one in-stock serial per assigned unit at the selected location.

Confirm that purchasing staff can use vendors, the target warehouse, and the existing Inventory Purchase Order workflow. Generating a draft does not approve, send, or receive a PO. Staff must still receive purchased goods and explicitly assign them to the Special Order. Special Order items are sourced only through their own stock assignments; Inventory's backorder holds and receiving matches skip them.

Set customer restriction responsibilities

Decide which staff may manage customer blocks through route permissions. On a customer account, open Actions and choose Special Order Blacklist. An internal note is required. If Show internal note to cashier is NO, a separate Cashier note is also required.

The optional Customer note is stored separately and is not sent when saved. An automatic removal date must be a future date. The block ends at the start of that date; with no date it continues until an authorized staff member removes it. The block affects new Special Orders only.

Practice the complete order workflow

1. Choose a sample customer and open the register to walk through your Special Order workflow.

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2. Add regular merchandise and at least one Special Order; include the same SKU in both forms to confirm separate lines.
3. Set a delivery date, deposit, and PO reference. Confirm the amount due today includes the regular goods and their tax, the deposits, and any other current charges. Each Special Order item's tax is part of its balance due later.
4. Complete a sample sale using your approved training payment procedure. Review each future-delivery item in the Special Orders report and confirm that stock is reserved at the intended fulfilment stage.
5. Generate a draft PO for uncovered units or assign existing stock. Confirm that assignment increases reserved quantity without deducting on hand.
6. Collect the outstanding balance through the customer's Special Orders list in POS. For tracked goods, record handover only after stock has been assigned.
7. Verify that handover reduces on hand and releases the reservation for the handed-over quantity, and that the status reads Partially Fulfilled or Fulfilled.
8. On a second paid test item, choose Cancel Item for one unit with a reason. Confirm that its assigned stock is released, the status and Refund Due update, and the order page lists the refund due.
9. Once no Special Order item on that sale is open, refund the Refund Due from the order's Refund screen as a fixed amount. Confirm that the item's Activity shows the recorded refund and that its Refund Due clears.
10. In POS, confirm that tenders above Due Today are refused and that an ordinary item on a mixed sale can still be refunded.
11. Test a customer block with a private internal note. Confirm that POS displays only the cashier wording, creator, creation time, and optional end date.

Use training records for your walkthrough and close out sample sales and inventory movements before your team starts live trading.

Pause new orders without stopping fulfillment

Keep Special Orders Enabled at YES and change Accept new special orders to NO. Existing recorded orders can still be paid, sourced, assigned, and handed over. Unplaced carts and held sales are still new bookings when they are checked out.

Setting the module itself to OFF stops its operational services as well as new bookings. While it is OFF, Orders also refuses refunds, cancellation, and completion of sales that contain Special Orders, because it cannot check their state. Settings remains the place to turn it back on. Do not uninstall a module containing Special Order history.

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